

DEVELOPING PEO'S NEXT STRATEGIC PLAN

By Andrew Tapp

Strategic planning is a useful tool for guiding an organization's day-to-day decisions and for evaluating progress and changing approaches when moving forward. PEO uses strategic plans to provide the association with direction. The last strategic plan was designed as a guide for 2015 to 2017, and featured 24 strategic objectives divided into five goal areas: practitioners, regulatory framework, stakeholders, operations, and Council, staff and volunteers. PEO's new plan will be similarly divided into strategic objectives and focus areas, although each label may change.

Development of PEO's vision for its 2018-2020 Strategic Plan began last fall, with a series of stakeholder consultations hosted by Registrar Gerard McDonald, P.Eng. The consultations were broken down into two phases, detailed below, and consisted of 28 sessions with various stakeholders, committees, and external organizations such as the Ontario Society of Professional Engineers, Consulting Engineers of Ontario and provincial government ministries.

SWOT SESSIONS

The first consultation phase consisted of a series of SWOT sessions—SWOT stands for Strength (what our organization does well), Weaknesses (areas in which our organization needs improvement), Opportunities (external factors that benefit the organization), and Threats (external factors that can harm the organization). During these sessions, McDonald met with staff, committee chairs and chapter leaders and asked them what they believed PEO's strengths, weaknesses, opportunities and threats were. The answers provided were analyzed by PEO's strategic planning team and grouped into categories.

At these SWOT sessions, McDonald also asked participants to provide one word to describe PEO. While participants' answers could only be one word, they were encouraged to submit as many answers as they liked. A computer program collected all the responses—submitted through smartphones—and used them to build a word cloud, where the most frequently submitted words were enlarged and centered. It was an effective way to show what people were thinking.

The data from these SWOT sessions were collected, analyzed and summarized into a series of charts that were used in the second stage of stakeholder consultations. Phase two consultations were more extensive than those conducted in the first phase—after being shown the SWOT data,

participants were asked to brainstorm possible strategic objectives to include in the plan, as well as to think of a word that describes what they would like PEO to be in the future. There were over 900 suggested one-word answers that were collected into a word cloud and the brainstormed objectives were analyzed and grouped.

Here's an example word cloud created at one of the sessions:



STRATEGY HACKATHONS

Running parallel to these consultations was another strategic planning activity: the PEO strategy "hackathons," an innovative business tool that involves a time-limited, creative group activity focused on solving a problem or challenge. More than just a brainstorming activity, it involves groups of two to five participants that build rough stereotypes and present them to the other groups.

The hackathons provided PEO staff with the opportunity to workshop solutions to perceived problems facing the organization. Every employee was required to attend a session and contribute to their assigned group. The hackathons examined eight challenges in the areas of PEO policy and operations.

Participants first reviewed an unedited selection of anonymous comments that were collected from fellow staff members before the hackathons and that pertained to one of the eight areas, and then used those comments to determine the key problems underlying the issues. Following this, group members individually brainstormed possible solutions, and then the group sorted them by the amount of resources a solution would cost and the impact it would likely have. The group then picked the top three solutions and presented them to the other groups. All the problems and solutions identified by staff have been recorded for use in this project and other operational initiatives.

PEO's strategic planning team analyzed and combined the data from the stakeholder consultations and the staff hackathons to create a draft list of over 40 possible strategies from the 400 original suggestions, and were then discussed and reduced to 25 strategic objectives by the senior management team.

The final stage of the consultation phase was the Council workshop held at the beginning of June. Council members took the 25 suggested strategic objectives and reduced them down to nine, based on their relevance to the organization and what value they added to PEO's mission. PEO is continuing to prepare the new strategic plan for its unveiling in the fall for Council's consideration. [e](#)

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